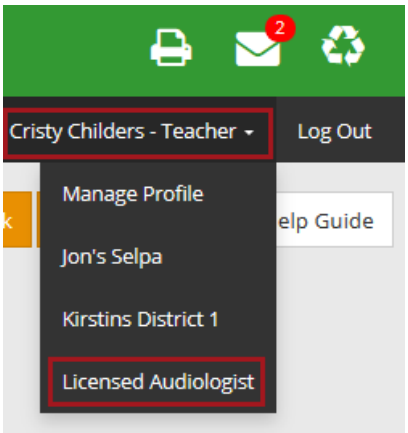
SEIS SERVICE TRACKER USER GUIDE

SEIS

The Service Tracking feature allows users to document the delivery of services and assessments to students. All pertinent information, such as IEP services, Caseloads, Provider Types, and Service Frequency / Duration, is automatically populated from the IEP. The Service Tracking feature will monitor the total amount of minutes provided to the student and can report to districts when services are being over-delivered or under-delivered.

VERIFYING YOUR USER ACCOUNT

This is especially important for Service Tracking, as each Provider Type is billed for differently. To verify your Provider Type, click on your name, on the top right of the upper navigation bar. If your Provider Type is incorrect, contact your District administrator.

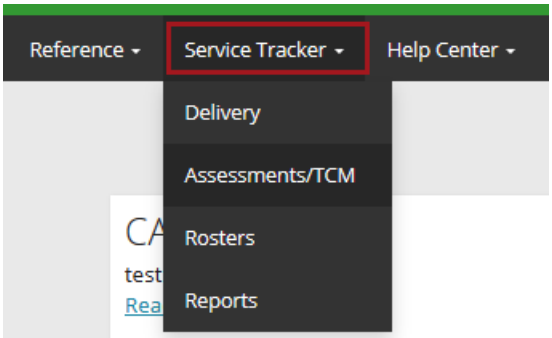


VERIFYING YOUR CASELOAD

All Eligible and Pending students that have Services on the services grid, will appear in Service Tracking. If a student needs to be added to your Caseload, submit an Add Student form. If a student needs to be removed from your Caseload, submit a Student Change form.

ACCESSING SERVICE TRACKING

Service Tracking is permission based. If the Service Tracking permission is given, the Service Tracker option will be located on the upper navigation bar. Click on Service Tracker to see the available options.

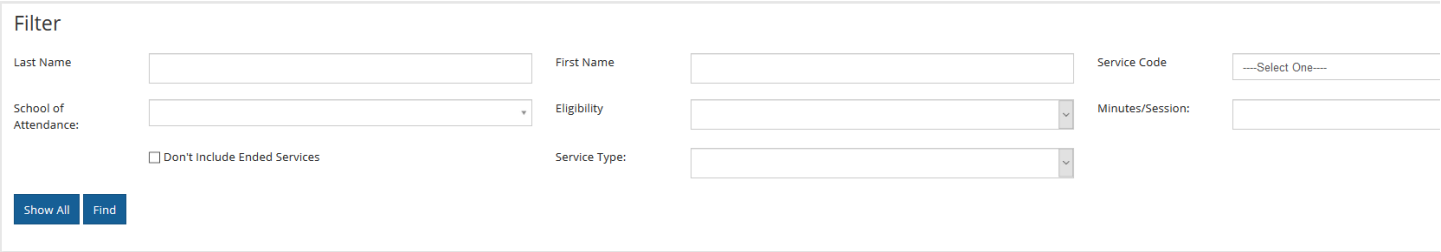


DELIVERIES

Access the Deliveries page by clicking on the Delivery option, under Service Tracker. This page will display all students that have services listed on the Future IEP.

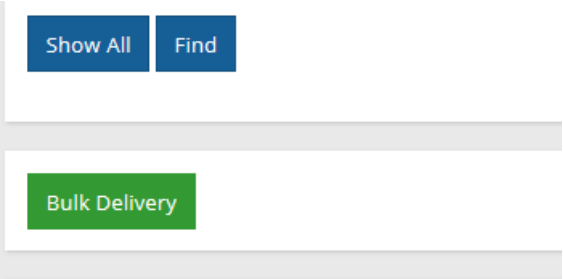
FILTERS

Utilize the filter options to filter down to the specific students you wish to deliver to.



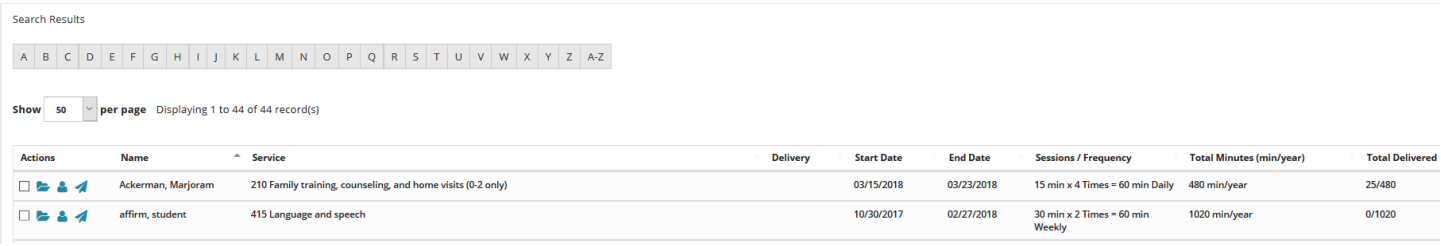
BULK DELIVERY

Bulk Delivery allows users to deliver to a group of students at one time.



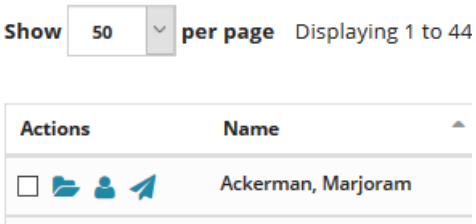
SEARCH RESULTS

Search Results displays all students with services on their Future IEP. It will display one line per students' service, along with their Service Code, Delivery, Start Date/End Date, Sessions/Frequency, Total Minutes and Total Delivered.



ACTION ICON

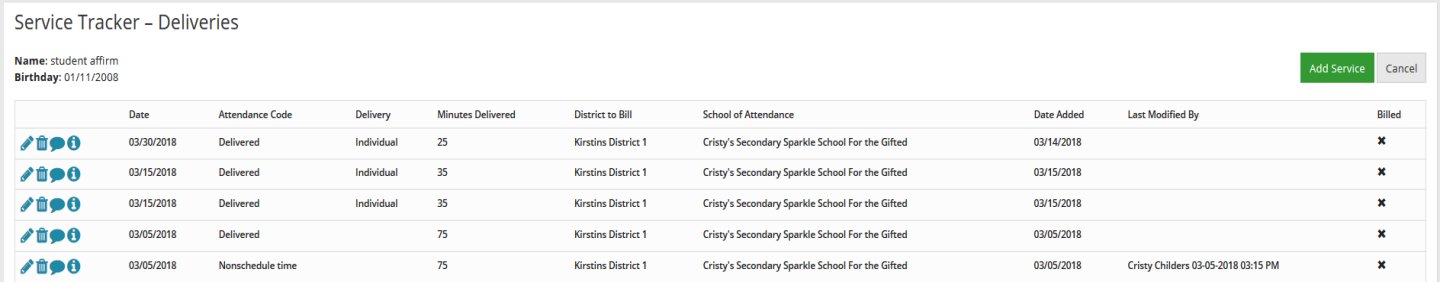
Allow users to View the student IEP, Student Record or Deliver to the service.



DELIVERY SUMMARY PAGE

Click on the Deliver icon to access the Delivery Summary page. This page displays each delivery that has been added to the service. Users will see the Edit and Delete icons for any delivery they have added.

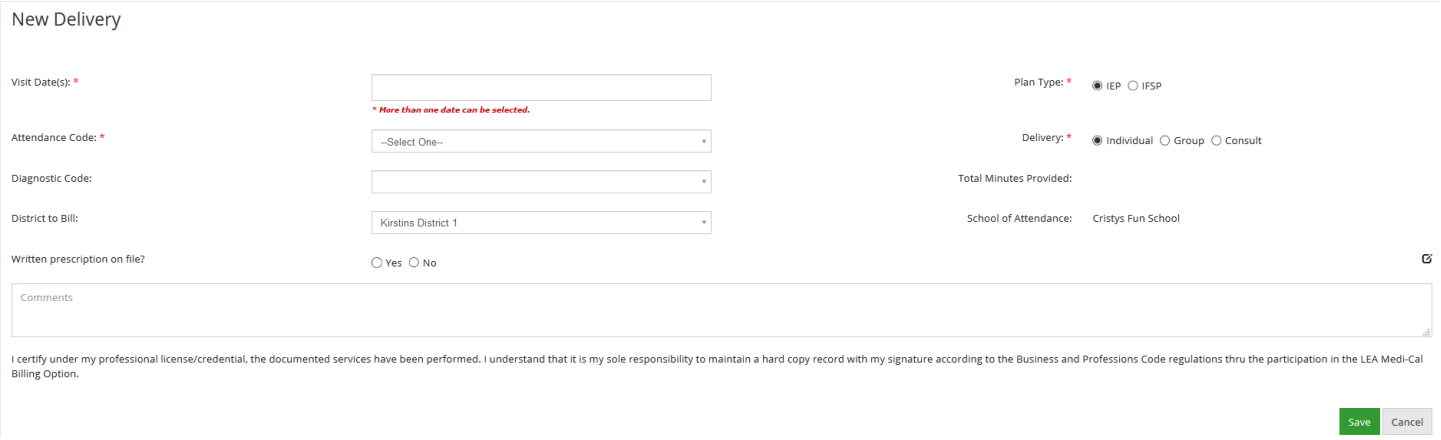
To add a new delivery, click the Add Service button.



	Date	Attendance Code	Delivery	Minutes Delivered	District to Bill	School of Attendance	Date Added	Last Modified By	Billed
	03/30/2018	Delivered	Individual	25	Kirstins District 1	Cristy's Secondary Sparkle School For the Gifted	03/14/2018		✖
	03/15/2018	Delivered	Individual	35	Kirstins District 1	Cristy's Secondary Sparkle School For the Gifted	03/15/2018		✖
	03/15/2018	Delivered	Individual	35	Kirstins District 1	Cristy's Secondary Sparkle School For the Gifted	03/15/2018		✖
	03/05/2018	Delivered		75	Kirstins District 1	Cristy's Secondary Sparkle School For the Gifted	03/05/2018		✖
	03/05/2018	Nonschedule time		75	Kirstins District 1	Cristy's Secondary Sparkle School For the Gifted	03/05/2018	Cristy Childers 03-05-2018 03:15 PM	✖

ADDING A DELIVERY

- **Visit Dates(s):** Users can select up to 10 days.
- **Plan Type, Delivery, and School of Attendance:** These fields are prepopulated based on the students IEP.
- **Attendance Code:** Select the appropriate Attendance code (Delivered, Absent, Non-Participatory, etc.)
- **Diagnostic Code:** This is based on the users Provider Type.
- **Total Minutes Provided:** Enter the total minutes that were provided (or would have been provided, depending on the Delivery Code selected).
- **District to Bill:** This will default to the users District, unless the user is shared with multiple districts.
- **Written prescription on file:** This is for OT and PT services only.
- **Comments:** Enter ay comments as necessary.
- **Case Notes:** Enter Case Notes as necessary. Please Note: Only the provider that entered the Case Notes can view the Case Notes.
- Click Save to complete the Delivery.

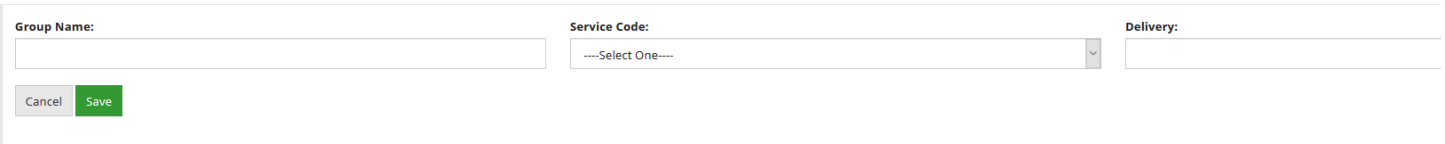


BULK DELIVERY

On the Deliveries page, click the Bulk Delivery button. This will allow users to add or manage group and bulk deliver to a group of students.

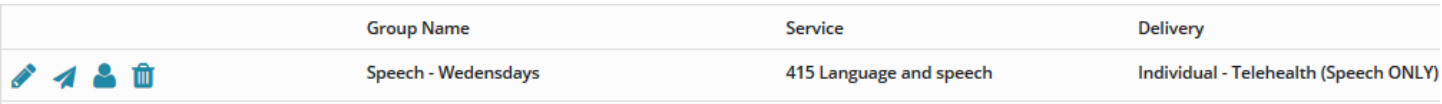
ADDING A NEW GROUP

- Click the Add Group button
- Enter the Group Name
- Select a Service Code
- Select the Delivery Type (Group or Individual)
- Click the Save button



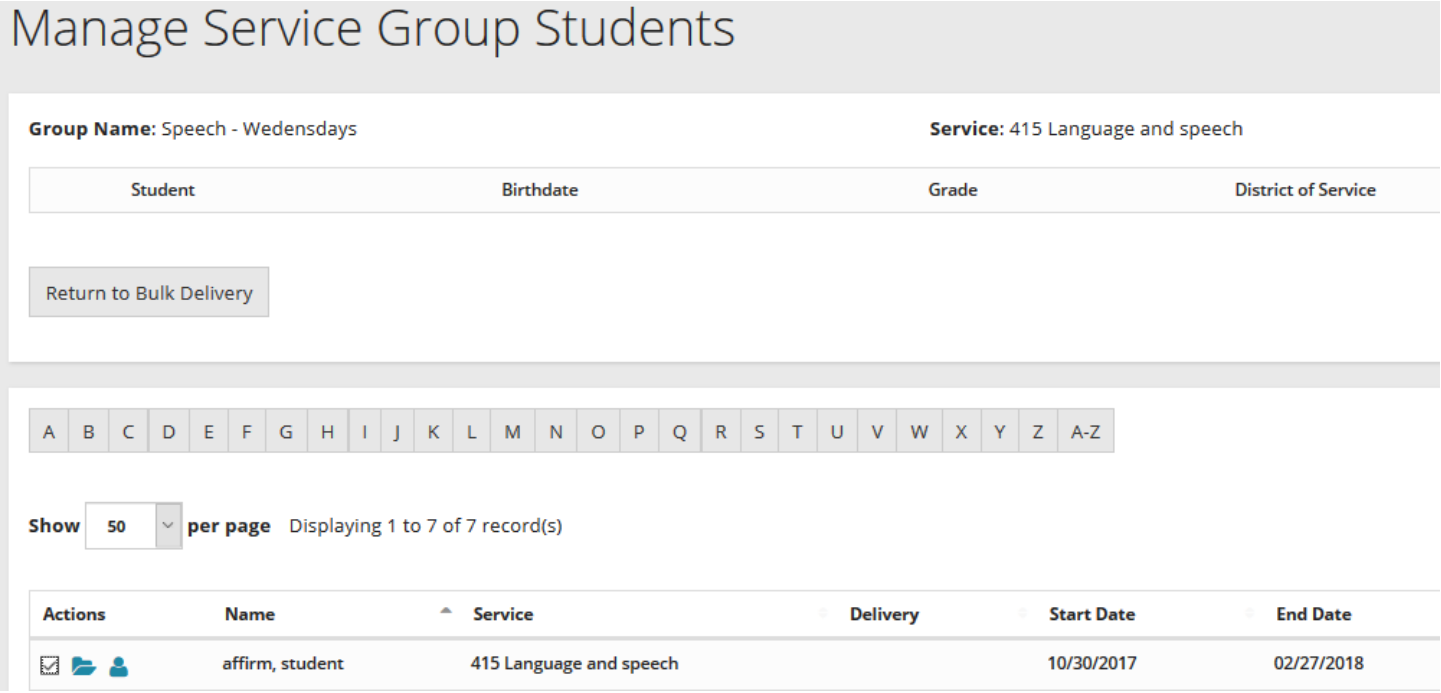
GROUP OPTIONS

- Edit Group
- Bulk Deliver to Group
- Manage Students in Group
- Delete Group



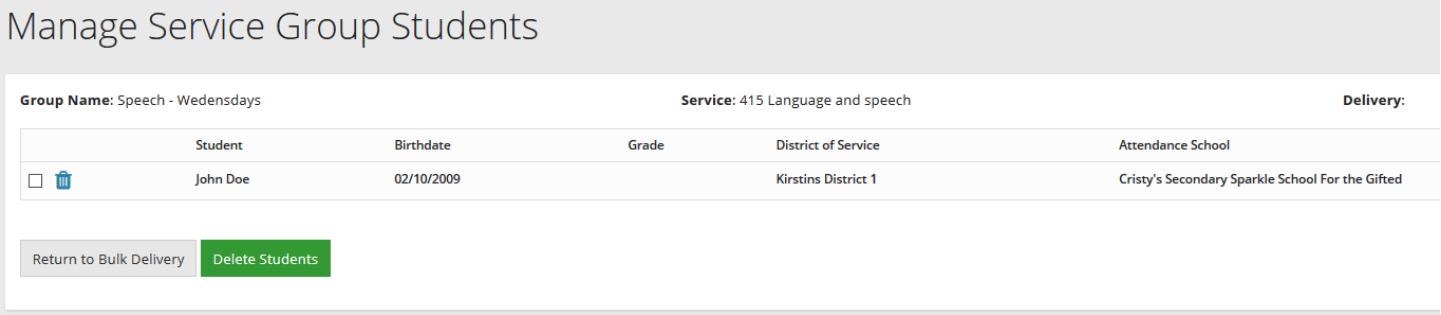
ADDING STUDENTS TO A GROUP

- Click the Manage Students in Group icon
- Any student with the same Service Code as the group, will appear on the list
- Check the box next to the student’s name
- Click the Add to Group button



REMOVING A STUDENT FROM A GROUP

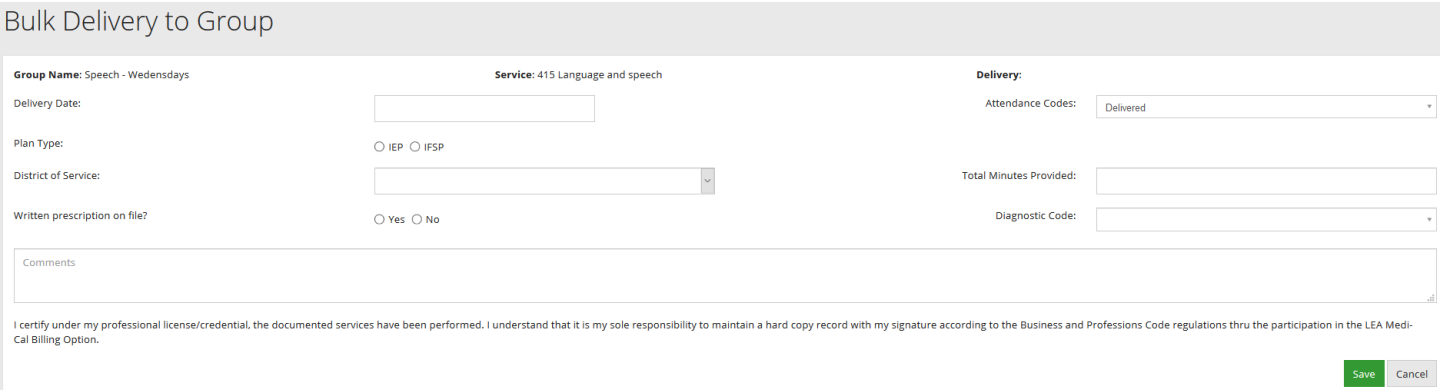
Click the Remove icon next to the student's name, or check the box next to the student's name and click the Delete Students button.



BULK DELIVER TO GROUP

On the Manage Groups page, click the Bulk Deliver icon for the group you wish to bulk deliver to.

- **Delivery Date:** Only one date can be selected
- **Attendance Code:** Select the code that represents all students in the group
- Click Save to complete the delivery.



ASSESSMENTS

Assessments can be added in Service Tracking to document the type of Assessment was provided to a student. Accessing the Assessments page by clicking on the Assessments option, under Service Tracker.

FILTERS

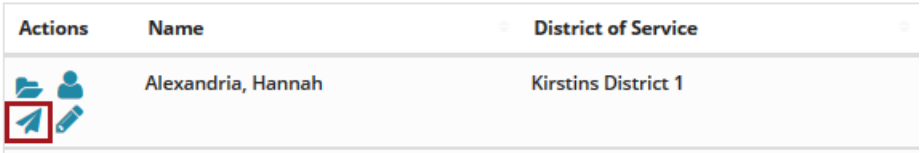
Utilize the filter options to filter down to the specific students you wish to deliver to.

SEARCH RESULTS

Displays all Eligible and Pending students on the users Caseload.

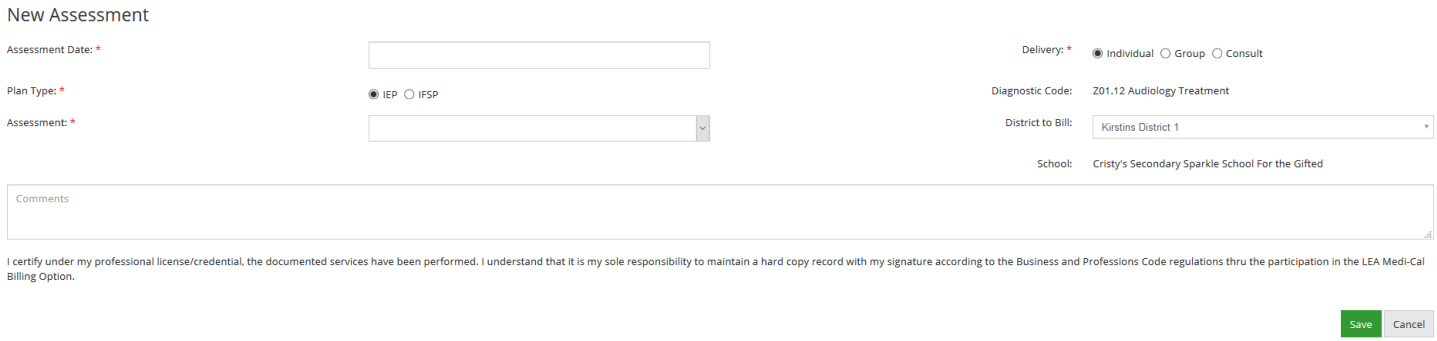
ACTION ICONS

Allow users to View the student IEP, Student Record or Deliver an Assessment.



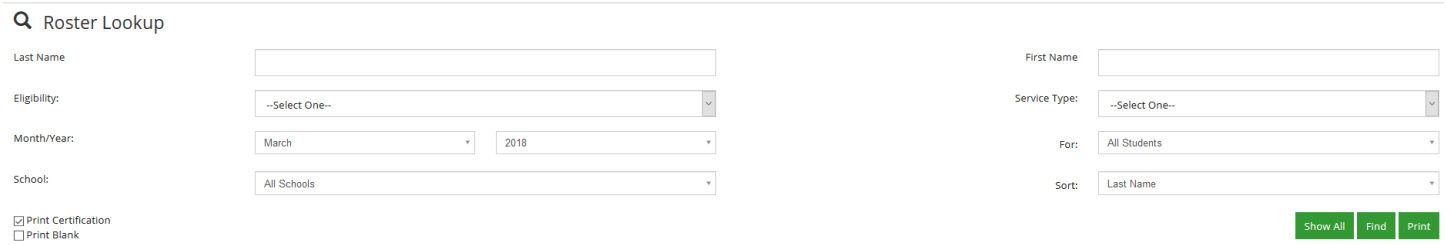
ADDING AN ASSESSMENT

- Click the Add Assessment icon
- **Assessment Date:** Select the Assessment date
- **Assessment:** Select the type of Assessment that was held
- **Delivery, Plan Type, Diagnostic Code and School:** Will auto populate based on students IEP
- **District to Bill:** Will default to user's district, unless user is shared with multiple districts.
- **Comments:** Enter comments as necessary
- Click the Save button to complete the Assessment

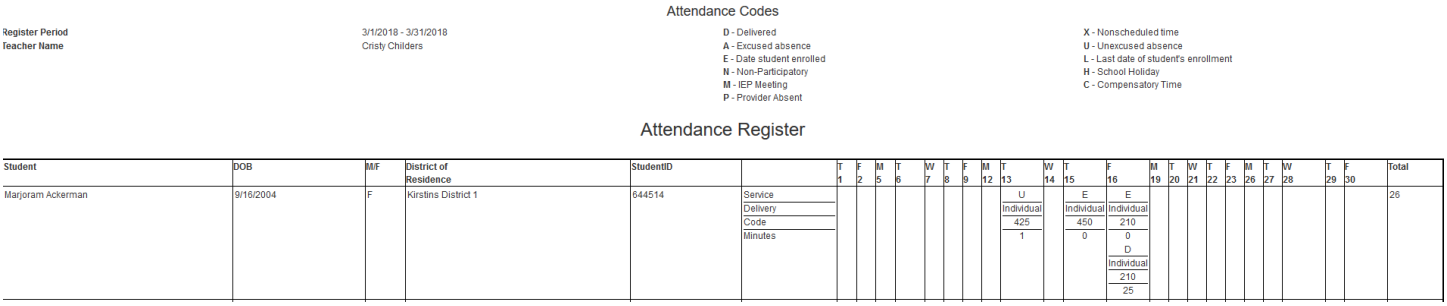


ROSTERS

To view and download Service Tracking Attendance Rosters, click on the Rosters option under Service Tracker. Use the Roster Lookup filters to generate an Attendance Roster for the Month and students needed.



Click the Print button to view/print the Attendance Roster. The printed Attendance Roster displays all students that were selected, along with their deliveries. The delivery will display the students Attendance Code, Delivery Type, Service Code and Total Minutes. Sign and date the Attendance Roster on a monthly basis.



Attendance Codes

Register Period 3/1/2018 - 3/31/2018
Teacher Name Cristy Childers

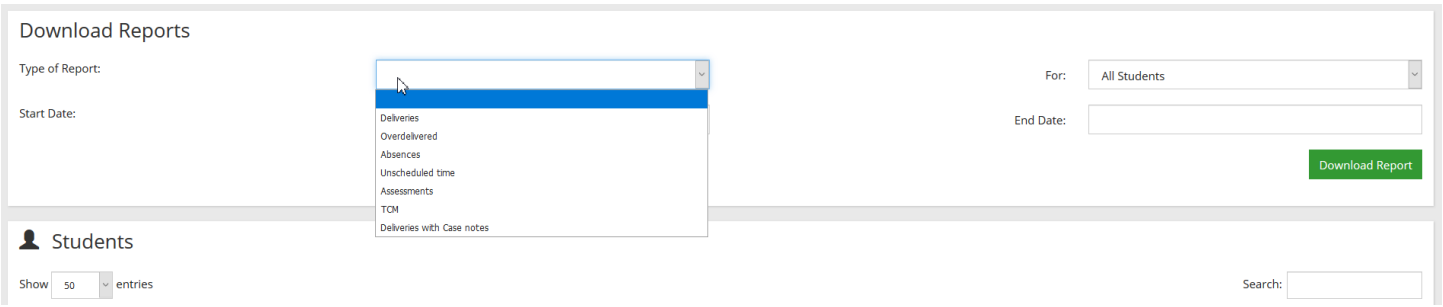
D - Delivered
A - Excused absence
E - Date student enrolled
N - Non-Participatory
M - IEP Meeting
P - Provider Absent

X - Nonscheduled time
U - Unexcused absence
L - Last date of student's enrollment
H - School Holiday
C - Compensatory Time

Attendance Register

Student	DOB	M/F	District of Residence	StudentID		T 1	F 2	M 5	T 6	W 7	T 8	F 9	M 12	T 13	W 14	T 15	F 16	M 19	T 20	W 21	T 22	F 23	M 26	T 27	W 28	T 29	F 30	Total
Marjoram Ackerman	9/16/2004	F	Kirstins District 1	644514	Service									U		E	E											26
					Delivery									Individual		Individual	Individual											
					Code									425		450	210											
					Minutes									1		0	0											
																	D											
																	Individual											
																	210											
																	25											

REPORTS

Service Tracking has multiple reports available. Click on Reports option under Service Tracker.

- **Deliveries:** shows all of the services delivered for the student(s) by a provider.
- **Overdelivered:** shows any student / service where the total minutes delivered is above the number of minutes written into the IEP.
- **Absences:** shows all service deliveries that were not delivered due to a student's absence.
- **Unscheduled Time:** shows all deliveries marked as unscheduled time.
- **Assessments:** will pull assessments entered.
- **Deliveries with Case Notes:** shows all of the services delivered with case notes for student(s) by a provider.